



California State Board of Education

Meeting Agenda Items for May 8-9, 2013

ITEM 17 ATTACHMENT 5

ITEM 8 ADDENDUM

AAV of Item 17 Attachment 5

Accessible Alternative Version (AAV) of Item 17 Attachment 5 for the May 2013 SBE Meeting Agenda.

This page is the Accessible Alternative Version (AAV) of Item 3 Attachment 4 from the [California State Board of Education \(SBE\) Meeting Agenda for May 2013](#). The scanned [Item 17 Attachment 5](#) (PDF) version is considered to be the official version of the document.

Economic and Fiscal Impact Statement

(REGULATIONS AND ORDERS). *User entries from the STD. 399 (REV. 12/2008) Form.*

Department Name: Education

Contact Person: Carolyn Nealon

Telephone Number: 916-319-0295

Descriptive Title From Notice Register Or From 400: Special Education (Version dated March 22, 2013)

Notice File Number: Z

Economic Impact Statement

Section A. ESTIMATED PRIVATE SECTOR COST IMPACTS (Include calculations and assumptions in the rulemaking record.)

Section A.1. Check the appropriate box(es) below to indicate whether this regulation:

- Selected option is H: None of the above (Explain below. Complete the Fiscal Impact Statement as appropriate)
- Option H explanation: The regulations would not impose any additional cost to the private sector.

Fiscal Impact Statement

Section A. FISCAL EFFECT ON LOCAL GOVERNMENT (Indicate appropriate boxes1 through 6 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

- Selected option is 4: No additional costs or savings because this regulation makes only technical, non-substantive or clarifying changes to current law regulations.

Section B. FISCAL EFFECT ON STATE GOVERNMENT (Indicate appropriate boxes 1 through 4 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

- Selected option is 4: Other. *No fiscal impact because this regulation makes only technical, non-substantive or clarifying changes to conform with current law.*

Section C. FISCAL EFFECT ON FEDERAL FUNDING OF STATE PROGRAMS (Indicate appropriate boxes1 through 4 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

- Selected option is 4: Other. *No fiscal impact because this regulation makes only technical, non-substantive or clarifying changes to conform with current law.*

Fiscal Officer Signature by Carolyn Nealon dated March 19, 2013

Agency Secretary Approval / Concurrence Signature by Jeannie Oropeza dated March 30, 2013

Department of Finance Approval / Concurrence Signature: No signature.

Questions: State Board of Education | 916-319-0827

Last Modified: Wednesday, May 01, 2013

ECONOMIC AND FISCAL IMPACT STATEMENT**(REGULATIONS AND ORDERS)**

STD. 399 (REV. 12/2008)

See SAM Section 6601 - 6616 for Instructions and Code Citations

DEPARTMENT NAME Education	CONTACT PERSON Carolyn Nealon	TELEPHONE NUMBER 916-319-0295
DESCRIPTIVE TITLE FROM NOTICE REGISTER OR FORM 400 Special Education (Version dated 3/22/13)		NOTICE FILE NUMBER Z

ECONOMIC IMPACT STATEMENT**A. ESTIMATED PRIVATE SECTOR COST IMPACTS** (Include calculations and assumptions in the rulemaking record.)

1. Check the appropriate box(es) below to indicate whether this regulation:

- | | |
|---|--|
| <input type="checkbox"/> a. Impacts businesses and/or employees | <input type="checkbox"/> e. Imposes reporting requirements |
| <input type="checkbox"/> b. Impacts small businesses | <input type="checkbox"/> f. Imposes prescriptive instead of performance |
| <input type="checkbox"/> c. Impacts jobs or occupations | <input type="checkbox"/> g. Impacts individuals |
| <input type="checkbox"/> d. Impacts California competitiveness | <input checked="" type="checkbox"/> h. None of the above (Explain below. Complete the Fiscal Impact Statement as appropriate.) |

h. (cont.) The regulations would not impose any additional cost to the private sector.

(If any box in Items 1 a through g is checked, complete this Economic Impact Statement.)

2. Enter the total number of businesses impacted: _____ Describe the types of businesses (Include nonprofits.): _____

Enter the number or percentage of total businesses impacted that are small businesses: _____

3. Enter the number of businesses that will be created: _____ eliminated: _____

Explain: _____

4. Indicate the geographic extent of impacts: ☐ Statewide ☐ Local or regional (List areas.): _____

5. Enter the number of jobs created: _____ or eliminated: _____ Describe the types of jobs or occupations impacted: _____

6. Will the regulation affect the ability of California businesses to compete with other states by making it more costly to produce goods or services here?

☐ Yes ☐ No If yes, explain briefly: _____**B. ESTIMATED COSTS** (Include calculations and assumptions in the rulemaking record.)

1. What are the total statewide dollar costs that businesses and individuals may incur to comply with this regulation over its lifetime? \$ _____

a. Initial costs for a small business: \$ _____ Annual ongoing costs: \$ _____ Years: _____

b. Initial costs for a typical business: \$ _____ Annual ongoing costs: \$ _____ Years: _____

c. Initial costs for an individual: \$ _____ Annual ongoing costs: \$ _____ Years: _____

d. Describe other economic costs that may occur: _____

ECONOMIC AND FISCAL IMPACT STATEMENT cont. (STD. 399, Rev. 12/2008)

2. If multiple industries are impacted, enter the share of total costs for each industry: _____

3. If the regulation imposes reporting requirements, enter the annual costs a typical business may incur to comply with these requirements. (Include the dollar costs to do programming, record keeping, reporting, and other paperwork, whether or not the paperwork must be submitted.): \$ _____

4. Will this regulation directly impact housing costs? ☐ Yes ☐ No If yes, enter the annual dollar cost per housing unit: _____ and the number of units: _____

5. Are there comparable Federal regulations? ☐ Yes ☐ No Explain the need for State regulation given the existence or absence of Federal regulations: _____

Enter any additional costs to businesses and/or individuals that may be due to State - Federal differences: \$ _____

C. ESTIMATED BENEFITS (Estimation of the dollar value of benefits is not specifically required by rulemaking law, but encouraged.)

1. Briefly summarize the benefits that may result from this regulation and who will benefit: _____

2. Are the benefits the result of: ☐ specific statutory requirements, or ☐ goals developed by the agency based on broad statutory authority?

Explain: _____

3. What are the total statewide benefits from this regulation over its lifetime? \$ _____

D. ALTERNATIVES TO THE REGULATION (Include calculations and assumptions in the rulemaking record. Estimation of the dollar value of benefits is not specifically required by rulemaking law, but encouraged.)

1. List alternatives considered and describe them below. If no alternatives were considered, explain why not: _____

2. Summarize the total statewide costs and benefits from this regulation and each alternative considered:

Regulation:	Benefit: \$ _____	Cost: \$ _____
Alternative 1:	Benefit: \$ _____	Cost: \$ _____
Alternative 2:	Benefit: \$ _____	Cost: \$ _____

3. Briefly discuss any quantification issues that are relevant to a comparison of estimated costs and benefits for this regulation or alternatives: _____

4. Rulemaking law requires agencies to consider performance standards as an alternative, if a regulation mandates the use of specific technologies or equipment, or prescribes specific actions or procedures. Were performance standards considered to lower compliance costs? ☐ Yes ☐ No

Explain: _____

ions in the rulemaking record.) Cal/EPA boards, offices, and departments are subject to the action 57005.

ECONOMIC AND FISCAL IMPACT STATEMENT cont. (STD. 399, Rev. 12/2008)

1. Will the estimated costs of this regulation to California business enterprises exceed \$10 million? ☐ Yes ☐ No (If No, skip the rest of this section.)

2. Briefly describe each equally as an effective alternative, or combination of alternatives, for which a cost-effectiveness analysis was performed:

Alternative 1: _____

Alternative 2: _____

3. For the regulation, and each alternative just described, enter the estimated total cost and overall cost-effectiveness ratio:

Regulation:	\$ _____	Cost-effectiveness ratio: \$ _____
Alternative 1:	\$ _____	Cost-effectiveness ratio: \$ _____
Alternative 2:	\$ _____	Cost-effectiveness ratio: \$ _____

FISCAL IMPACT STATEMENT

A. FISCAL EFFECT ON LOCAL GOVERNMENT (Indicate appropriate boxes¹ through 6 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

- ☐ 1. Additional expenditures of approximately \$ _____ in the current State Fiscal Year which are reimbursable by the State pursuant to Section 6 of Article XIII B of the California Constitution and Sections 17500 et seq. of the Government Code. Funding for this reimbursement:
- ☐ a. is provided in _____, Budget Act of _____ or Chapter _____, Statutes of _____
- ☐ b. will be requested in the _____ (FISCAL YEAR) Governor's Budget for appropriation in Budget Act of _____
- ☐ 2. Additional expenditures of approximately \$ _____ in the current State Fiscal Year which are not reimbursable by the State pursuant to Section 6 of Article XIII B of the California Constitution and Sections 17500 et seq. of the Government Code because this regulation:
- ☐ a. implements the Federal mandate contained in _____
- ☐ b. implements the court mandate set forth by the _____
court in the case of _____ vs. _____
- ☐ c. implements a mandate of the people of this State expressed in their approval of Proposition No. _____ at the _____ election; (DATE)
- ☐ d. is issued only in response to a specific request from the _____
_____, which is/are the only local entity(s) affected;
- ☐ e. will be fully financed from the _____ (FEES, REVENUE, ETC.) authorized by Section _____ of the _____ Code;
- ☐ f. provides for savings to each affected unit of local government which will, at a minimum, offset any additional costs to each such unit;
- ☐ g. creates, eliminates, or changes the penalty for a new crime or infraction contained in _____
- ☐ 3. Savings of approximately \$ _____ annually.
- ☒ 4. No additional costs or savings because this regulation makes only technical, non-substantive or clarifying changes to current law regulations.

ECONOMIC AND FISCAL IMPACT STATEMENT cont. (STD. 399, Rev. 12/2008)

- ☐ 5. No fiscal impact exists because this regulation does not affect any local entity or program.
- ☐ 6. Other.

B. FISCAL EFFECT ON STATE GOVERNMENT (Indicate appropriate boxes 1 through 4 and attach calculations and assumptions of fiscal impact for the current year and two subsequent Fiscal Years.)

- ☐ 1. Additional expenditures of approximately \$ _____ in the current State Fiscal Year. It is anticipated that State agencies will:
- ☐ a. be able to absorb these additional costs within their existing budgets and resources.
- ☐ b. request an increase in the currently authorized budget level for the _____ fiscal year.
- ☐ 2. Savings of approximately \$ _____ in the current State Fiscal Year.
- ☐ 3. No fiscal impact exists because this regulation does not affect any State agency or program.
- ☒ 4. Other. No fiscal impact because this regulation makes only technical, non-substantive or clarifying changes to conform with current law.

AMS (Indicate appropriate boxes 1 through 4 and attach calculations and assumptions of fiscal

- ☐ 1. Additional expenditures of approximately \$ _____ in the current State Fiscal Year.
- ☐ 2. Savings of approximately \$ _____ in the current State Fiscal Year.
- ☐ 3. No fiscal impact.
- ☐ 4. Other. No fiscal law.

FISCAL OFFICER SIGNATURE



4/19/13

PROGRAM BUDGET MANAGER

2



DATE

4/30/13

- The signature attests that the agency has completed the STD.399 according to the instructions in SAM sections 6601-6616, and understands the impacts of the proposed rulemaking. State boards, offices, or department not under an Agency Secretary must have the form signed by the highest ranking official in the organization.
- Finance approval and signature is required when SAM sections 6601-6616 require completion of Fiscal Impact Statement in the STD.399.

ITEM ADDENDUM

DATE: April 29, 2013

TO: MEMBERS, State Board of Education

FROM: TOM TORLAKSON, State Superintendent of Public Instruction

SUBJECT: Item 8 – 2014 Mathematics Primary Adoption of Instructional Materials: Appointment of Instructional Materials Reviewers, Content Review Experts, and Non-Instructional Quality Commissioner Facilitators; Approval of Revision to the Schedule of Significant Events; Approval of Reviewer Training Materials; and Approval of Publisher Fee Reduction Request.

Summary of Key Issues

In January 2013 a recruitment letter from State Superintendent of Public Instruction Tom Torlakson was sent to district and county superintendents, curriculum coordinators in mathematics, and other interested individuals and organizations, to recruit mathematics educators to serve as Instructional Material Reviewers (IMRs) and Content Review Experts (CREs). Recruitment letters were also sent to college and university departments of mathematics, and to a number of professional associations related to mathematics. The application forms for the IMRs and CREs were posted on the CDE Web site through April 25, 2013.

On March 22, 2013, the Instructional Quality Commission (IQC) recommended the initial cohort of IMR and CRE applicants, received through March 8, 2013, to the State Board of Education (SBE). The IQC also delegated authority to their Mathematics Subject Matter Committee (SMC) to review and recommend any future applicants on behalf of the full commission. On April 19, 2013, the IQC Mathematics SMC recommended the second cohort of applicants, received between March 9, 2013, and April 15, 2013, for approval by the SBE. Those applicants were submitted to the SBE prior to this addendum.

On April 29, 2013, the IQC Mathematics SMC reviewed applications and recommended the final cohort of applicants, received between April 16, 2013, and April 25, 2013. This final cohort of applicants is listed below.

Profile of IMR and CRE Applicants

The role of the IMR is to review submitted programs to determine their alignment with the content standards and the evaluation criteria adopted by the SBE. The CRE members serve as mathematics content experts and confirm that the instructional materials are mathematically accurate and based on current and confirmed research.

A majority of the IMR applicants are classroom teachers, as required by the *California Code of Regulations*, Title 5, Article 2.1, Section 9516, but also include curriculum specialists, program coordinators, and consultants. All of the CRE applicants have an advanced degree in mathematics.

Of the 45 applications submitted in this final cohort, 7 of the applicants are male; 21 applicants are female; 17 applicants declined to state gender. Thirteen applicants are from northern California; 29 applicants are from southern California, and 3 are from central California.

This final cohort includes the following applicants:

Submission ID	Applicant Type	First Name	Last Name
758	Reviewer	Jaime	Bonato
759	Reviewer	Leanne	Leonard
761	Reviewer	Linda	Laymon
762	Reviewer	Rona	Dosen
766	Reviewer	Jill	Warriner
767	Reviewer	Michele	Lenertz
768	Reviewer	Long	Truong
769	Reviewer	Lisa	Wright
770	Reviewer	Jeffrey	Linder
771	Reviewer	Patricia	Birk
772	Reviewer	Lisa	Amenta
773	Reviewer	Anna	Kearney
774	Reviewer	Mary Ann	Lyons
775	Reviewer	James	Sheldon
776	Reviewer	Angelica	Trujillo
777	Reviewer	Linda	Spincola
778	Reviewer	Yolanda	Munoz
779	Reviewer	Leah	Leonard
780	Reviewer	Gertrude	Cowan
781	Reviewer	Peter	Iroekwe
782	Reviewer	Maria	Hirsch
783	Reviewer	Erica	Olmstead
784	Content Review Expert	Eli	Goldwyn
786	Reviewer	Vinh	Lam
787	Reviewer	Lillie	Dabai
788	Reviewer	Tim	Leonard
789	Reviewer	Jean	Mbomeda
790	Reviewer	Joan	Commons
792	Reviewer	Katharine	Clemmer
793	Reviewer	Kimberly	Samuel
794	Content Review Expert	Susan	Addington
795	Content Review Expert	Javier	Trigos
796	Reviewer	Jack	Bloom

Submission ID	Applicant Type	First Name	Last Name
797	Reviewer	Kathy	Schwickert
798	Reviewer	Sara	Tolle
799	Content Review Expert	Philip	Ogbuehi
800	Reviewer	Shirley	Guzman
801	Reviewer	Daina	Lujan
802	Reviewer	Sharie	Dodd
803	Reviewer	Jennifer	Bourgeois
804	Content Review Expert	Angelo	Segalla
805	Content Review Expert	Jean	Simutis
806	Reviewer	Andrea	Kojima
807	Reviewer	Pamela	Alvarado
808	Reviewer	Jacqueline	Carter

Full applications are available for viewing in the State Board of Education office.